

INFORMATION TECHNOLOGY SERVICES BRANCH
STATUS REPORT
August 20, 2008

Attachment A – Item 12

	Task	Start	Finish	Status	Risks/Issues
1	Pension System Resumption (PSR) Project	02/09/05	11/30/09	<ol style="list-style-type: none"> 1. At the Board's direction, detailed design for the integration of PSR with the CalPERS Financial Services System commenced on June 30. Over the next five months, subject matter experts from the Fiscal and Member Services Divisions will work with Accenture to define system specifications. 2. When presented the PSR data requirements for payroll, contributions, and enrollment information, the Employer Advisory Groups expressed concerns about the proposed content and format. Subsequently, the Team modified the data reporting requirements to reduce the impact to Employers' legacy systems. The modified file formats are under internal review. 3. Due to project dependencies, there are implications to PSR if the schedule or design of the State Controller's Office's (SCO) 21st Century Project changes. A letter was sent to the SCO on June 29 requesting confirmation that they could meet our planned testing schedule. While the two teams are working closely to reach agreements, contingency plans are being developed to address delays, if necessary. Additionally, the 21st Century Project has changed its design for data exchange with CalPERS from batch to real-time. This change will allow participants to get immediate confirmation when they submit their application for benefits; however, it presents a design change for PSR. The cost and schedule impacts of this change will be presented to the PSR Steering Committee in August. 4. Significant progress has been made on the detailed design for Retirement and Health Enrollments. Specifications were reviewed and approved, along with testing plans for these functions. Detailed design efforts for Contributions and Benefit Estimates are, also, in progress. 	<ol style="list-style-type: none"> 1. The potential impact of the Financial Services Integration requirements on the PSR Schedule may be significant; the impact will be defined during the Detailed Design effort currently in progress.

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				<p>5. Initial Data Conversion tests, the first in a series to validate Data Clean Up efforts, were successfully conducted in June and July. These tests are proved the accuracy of the conversion processes associated with Retirement and Health Enrollments. Additional tests are in progress to verify sample data conversions associated with Contributions.</p> <p>6. Data Clean Up work exceeded planned expectations by 9,341 error corrections brining the total number of errors corrected to date to 524,953.</p> <p>7. To reduce contention for CalPERS resources, a technology project governance process was approved by the Board in June. On July 1, the IT Project Governance Process became effective; project requests are reviewed by the Executive team on a weekly basis. Of the 22 projects currently in progress but not related to PSR, six have been cancelled or deferred and two are under review.</p>	

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2	Enterprise Transition Management (ETM) Project	7/30/2007	7/30/2010	<ol style="list-style-type: none">1. In collaboration with the Business Owners and Steering Committee, ETM Team is refining the project scope to focus on the organizational changes and training activities necessary to support and ensure a successful transition to the new PSR solution. Once the scope has been finalized, the budget, schedule, staffing plan and deliverables will be adjusted accordingly.2. ETM held the quarterly Coaches Network meeting on June 19, 2008. Planning is underway for the July Snack & Track sessions which will include two manager sessions and two staff sessions; sessions will be held on July 10, 15, 24, and 31, 2008. Topics for discussion include: Skills Inventory Results, Focus Group Results, and Change Readiness Assessment.3. The ETM Project recently finished the skill inventories and gap analysis for the business areas of CalPERS. Assuming minimal change to job roles when PSR goes live, there were no skill gaps identified that warranted immediate attention. ETM conducted the ITSB employee skills inventory and gap analysis during the month of July. Results will be compiled and presented to ITSB Senior Management during August to ensure training needs are adequately addressed.	

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3	Public Employer Readiness Team (PERT)	04/01/08	11/30/09	<ol style="list-style-type: none">1. PERT began contacting State agencies and third party payroll providers to establish points of contact for the “on-boarding” activities associated with the implementation of PSR for Employers. Points of contact have been obtained for the nearly 2,000 schools, courts, and local public agencies that report enrollment or contribution data directly to CalPERS.2. The release of the Phase One Employer Information Packet has been scheduled for August 11 and will include the employer file formats for retirement and health enrollment, and payroll contributions.3. The launch of the first Education Phases was rescheduled to late August; approximately 44 web conferences will be conducted from August through October 2008. At the completion of the first phase, Employers will choose their enrollment and contribution reporting methods.4. PERT and PSR have received confirmation that the following agencies will participate as early adopters of PSR and engage directly with PSR-Accenture in System and Assembly Testing activities: San Bernardino County Superintendent of Schools, City of Santa Ana, and California State University Chancellor’s Office. County of Riverside has expressed interest, but determined that they could not meet the testing schedule at this time.	<ol style="list-style-type: none">1. Some Employers may not be ready with the new PSR format for enrollment and contribution data.